



## A Guide to Retreat Success



### Pre-Retreat, 8 - 10 weeks Ahead - Inspiration

*"We wound up creating a community of people who were excited to add their two cents to the event"* says one organizer. Crowd-sourcing ideas can be a great way to build excitement for your retreat. It also creates connections ahead of the experience. It's important to do it right.

Instagram pages, Reddit threads, LinkedIn groups, and other channels are great places to connect with potential attendees to get input - and later for promotion of course. Create a Facebook group where you can share and update details of your retreat. Be sure to stay engaged with it often. Another option is to send a pre-retreat survey with a few open-ended questions in the mix.

- Getting input in advance of a retreat might make the difference between mediocre or magnified success.
- Once your data is gathered, solidify and narrow your retreat concept and its objective. Be sure to name your retreat something that reflects its goals.
- An option to have an event app gives you the chance to speak with your audience, and to listen as well. They're no longer a costly endeavor.
- For business and corporate retreats, have managers ask their teams what they're looking for this year, ideally before the planning process begins.
- Be mindful of not relying too strongly on crowd-sourced content. People are coming to learn, and to have their mindset stretched a bit.

For pricing of your own retreat, consider costs, particularly if other businesses are contributing, and your profit goals. Be mindful of pricing too low that might risk your losing credibility.



## Pre-Retreat 6 - 8 Weeks Ahead - The Venue

*“Smaller, more remote destinations have been increasingly popular,”* says one destination management company. Selecting the perfect venue requires research, and it may eventually be a referral or recommendation from a colleague or similar business. Does the venue have your preferred dates available? Is the location convenient for travelers from any direction? Are the accommodations both comfortable and affordable in terms of your profit margin? Are there on-site activities that compliment your retreat activities? What are their options for meals?

Get confirmation from your venue that all your needs will be met, so they have time to fulfill any special requests. If possible, visit the site, or see if they have a virtual tour option. Is the size of your anticipated group appropriate to the venue?

If you are needing a certain microphone type or have specific dietary preferences for meals, give your venue an opportunity, and the time, to provide information on these or any other requirements, including insurance.

- Don't leave anything to chance! Have at least 2 lists, your own packing list and the list of what the venue is responsible for. Is there Wifi on site?
- If you have Team Building activities in mind, do your research on trends, the effectiveness of each activity type, and gauge the tastes and interests of your retreat guests.
- Does your venue have suggestions, or equipment and facilities, for group activities? Keep a dialogue going as each concern arises. Reach out to others who have had retreats at your venue for tips or advice.
- If you have a lot of moving parts, or assistants to manage, consider using a project management app like Trello or Basecamp, or just a basic spreadsheet.

If this is your first retreat, it might be beneficial to collaborate with other businesses that have a similar audience. For example, if you run a yoga studio, partner with a skincare company, a massage therapist, or a fitness clothing company to co-host your retreat. As well as sharing the financial burden, they can co-promote and share in the profits. A beneficial relationship can ease the stress of running your first retreat.



## Pre-Retreat 4 -6 Weeks Ahead - Thinking of Everything

Make a few contingency plans. Create a few what-if scenarios. Fine tune your schedule and itinerary. Make a list of all the questions your clients might ask and have the answers ready. Think of any extra touches you may wish to include, such as free water bottles with your company name, or a printed itinerary in each room. Be sure you have dietary restrictions or any physical limitations addressed. Define your refund policy and align it with the venue's policy.

Getting the word out to fill your retreat space is, as you might expect, a multi-path approach. If you're not a social media expert, hire a friend or get a referral. Be sure to include photos of the venue in your promotions. If your budget allows, hire an agency that will target your potential market and send out press releases.

- Offer early bird pricing
- Offer a retreat mini-session online, if possible, as a preview.
- If you have existing classes or training, either in person or online, be sure to mention your upcoming retreat.
- If you know brands that align with your business, consider approaching them with sponsorship opportunities.

This is a good time to prioritize your own self care. You don't want to arrive burnt out for hosting and leading the retreat. Stay rested. Delegate what you can.

- For business retreats, be clear about what your retreat participants can expect, including weather conditions and aspects of the area surrounding the venue.
- Create anticipation for team members with information on extra, offline activities. Be enthusiastic about the chance to unplug, and the benefits of gathering in person for creating or renewing personal connections.

No retreat is perfect, and yet doing your best while creating an amazing, empowering experience for your clients or team members is the most important part of hosting a retreat. Being passionate about what you are offering, and giving retreat participants some flexibility while they learn, will go a long way towards success.



## Wellness at Retreats

*“I think the entire concept of meeting in person is Wellness in and of itself.”* says a VP for an event company. It’s about the human connection. There is a vibrant energy when people gather together in person. We had been isolated for a long time, so it’s refreshing to see those familiar, smiling faces that aren’t on a screen.

- With a balance of activities in mind, plan on allowing time for people to disengage and relax after or between activities to reset their emotions and perspective.
- It can be overwhelming for some individuals to be in a room full of strangers, or absent colleagues, after a long hiatus of solo endeavors.
- Adhere to the schedule so there is structure, and so your retreat guests’ down time remains available.
- Be sure to capture plenty of images for marketing your next retreat.



## Post Retreat

Send a survey within a week to 10 days afterwards. Be sure to keep it anonymous. There are several free survey creator tools available. Use the feedback to plan your next successful retreat.

Retreats foster increased productivity and creativity for co-workers, and a renewed outlook for everyone, so encourage clients to keep those benefits in the foreground and active as long as possible afterwards. Enjoy the rewards of supporting the journeys of more fulfilled, more connected, and more enlightened individuals. Congratulations! You did it!

We hope this information was helpful.

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